

Position Profile



Wellesley, MA

Executive Director

The Community

The Town of Wellesley is a thriving, mature residential community located approximately 13 miles west of Boston. Its beauty and geographic location make it a highly desirable suburb for people living and working in the greater Boston area. Wellesley is also a community that emphasizes education, and it is home to several prominent educational institutions including Babson College, Dana Hall School, Massachusetts Bay Community College, Tenacre Country Day School, and Wellesley College.

Wellesley was incorporated in 1881 and is part of Norfolk County, bordered by Natick on the west, Weston and Newton on the north, Needham on the east and southeast, and Dover on the south. Wellesley is 13 miles west of Boston; 27 miles east of Worcester; 40 miles north of Providence, Rhode Island; and 205 miles from New York City.

Wellesley is 10.49 square miles in size and has approximately 28,000 official residents. According to the 2010 US Census, the Town racial makeup was 84.6% white, 10% Asian, 3.4% Hispanic or Latino, and 2.2% Black or African American.

The Town is demographically slightly younger than the state as a whole; Wellesley has a median age of 38.2 compared to the state median age of 39.1, according to the U.S. Department of Commerce, Bureau of the Census.

The Town's proximity to Boston, access to public transportation and major interstate roads, and reputation for quality of life and excellent services, especially in education, have made it an attractive location for professionals who work in the city and whose wealth levels are among the highest in the Commonwealth. The Town's per capita

income of \$72,046 is among the top six in Massachusetts, and two times the state average. The relative wealth of the Town is also reflected in the median home value of \$960,000, which is more than twice the state median value.

The community is primarily residential, accounting for 87.1% of the assessed property valuation of the Town. There is a substantial amount of non-taxable property belonging to the colleges. Commercial development occurs primarily within two major areas of the Town: a relatively large and thriving central business district of downtown Wellesley, which is considered to be an important asset of the Town in creating vibrancy and a sense of community; and the Route 9 corridor which intersects with I-95 and is a prime location for major office buildings and some additional retail space. Commercial property comprises 11.8% of the assessed property valuation of the Town.

The top five employers in the Town are Sun Life Financial, Wellesley College, Babson College, Eagle Investment Systems, and Harvard Pilgrim Health Care, with a combined total of approximately 4,300 employees.

Wellesley residents place a high value on education as reflected in the resources allocated to the local public schools, the performance of the school system, and demographic information which indicates that more than 66% of Wellesley households have at least one individual holding an advanced degree. By comparison, just over 39% in the state have a bachelor's degree or higher. In 2009 Wellesley was ranked #2 in "America's Most Educated Small Towns," according to Forbes.

Wellesley has an abundance of cultural and recreational assets that contribute to the quality of life within the Town. Among these assets are an active and well-utilized Wellesley Free Library, robust recreational offerings for all age groups, community concerts, and numerous local artists and art organizations. The Town is also home to the Wellesley Symphony Orchestra, the Davis Museum at Wellesley College which houses a significant permanent collection of art and regular special exhibits, and the Massachusetts Horticulture Society's Garden at Elm Bank.

The Town has several hundred acres of diverse protected open space throughout the community, including parks, forestland and scenic water resources. Wellesley has also built an extensive trail network of nearly 30 miles throughout the Town. Residents are sensitive to and active regarding environmental issues.

Wellesley citizens are proudly engaged in the affairs of their community with a strong culture of volunteerism and civic activism. This activism takes its form in a high level of political activity through voting, volunteering on citizen committees, elected offices, and participation in community meetings and forums. In addition, there are numerous charitable and community action groups within Wellesley that work on social service needs of various population groups within and outside the Town.

The Government

Wellesley's government, best described as decentralized, is comprised of a five-member Board of Selectmen that serves as the Town's executive board, several other elected and appointed boards for specific governmental functions, and a Representative Town Meeting that serves as the legislative body of

the Town. The membership of the Representative Town Meeting includes 240 elected representatives from eight (8) precincts. An elected Town Moderator who is also responsible for the appointment of a fifteen-member Town Meeting Advisory Committee and a five-member Human Resources Board as well as Permanent Building Committee, Audit Committee, and Community Preservation Committee chairs the body.

Other elected officials include a Town Clerk, a School Committee that oversees local school affairs, a Board of Library Trustees that oversees three public libraries, a Board of Assessors, a Board of Health, a Natural Resources Commission to oversee all Town land, a Recreation Commission, a Board of Public Works, a Planning Board, and a state regulated Housing Authority. The multi-member Boards are responsible for direction of affiliated personnel. There is also a Municipal Light Board consisting of the BPW Board plus two appointees from the Board of Selectmen. The Town has its own Retirement Board. The Town also utilizes a large number of appointed boards and commissions, with various modes of appointment, to conduct municipal operations.

The Board of Selectmen are deemed by State statute to be the chief elected and executive officials of the Town and set many of the Town's operational policies. The Board of Selectmen appoints members of the Police Department, Fire Department, Building Department, and Parking Clerk. The Board appoints an Executive Director of General Government Services to assist them in their executive responsibilities. The Town has had three Executive Directors since the position was established in 1987. The current vacancy results from the retirement of the present Executive Director after 10 years.

The Position

The Executive Director serves as the Chief Operating Officer of the Town and oversees the daily operation and financial affairs of the Town. The Executive Director, along with two Deputy Directors, assists the Selectmen in the annual development of Town-wide goals and objectives and is responsible for coordinating initiatives to achieve such goals and objectives. The Executive Director manages all staff under the purview of the Board of Selectmen, and is responsible for executing the policy directives of the Board of Selectmen. The Executive Director provides a leadership role in coordinating all Town departments and the various Town boards in responding to municipal issues. The Executive Director is responsible for the annual preparation and implementation of the Town-wide financial plan, Five-Year Capital Plan, and Annual Operating Budget.

The Executive Director informs the Board of Selectmen and other Town officials as to the legal, financial and operational matters of the Town.

The full Executive Director Position Description can be found at http://wellesleyma.gov/Pages/WellesleyMA_HR/ed_search

Finances

Wellesley's finances are strong and stable, holding a Moody's rating of Aaa, with a stable outlook, based upon a credit analysis of May 2016. The rating was based upon the considered strength of "the town's sizeable and wealthy suburban tax base, well-managed financial position with stable reserve levels, and history of voter approved overrides to the tax levy limitations of Proposition 2 ½."

In FY17 the total general fund budget for the Town is approximately \$157 million. Debt service represents approximately 8.2% of the budget.

Total debt for the Town is approximately \$147 million. Nearly 60% of the existing debt will be retired within ten years, representing a philosophy of conservative amortization. While the direct debt burden for the Town has increased to 1.4% of equalized value, this level remains manageable, as most of the debt has been excluded from the Proposition 2 ½ levy limit.

The Town has a retirement liability of approximately \$148.5 million that is on schedule to be retired by 2030. The Town has also been aggressive in addressing its OPEB liability. As of 6/30/14 the funded ratio had reached 29.5% with full funding projected for 2037. The Town is well ahead of most other local governments.

The Town has healthy General Fund reserves of approximately \$23 million, or 15% of total revenues.

The Town's business activities, or enterprise funds, for water, sewer and electricity are equally healthy, with total reserves exceeding \$94 million.

The most recent Comprehensive Annual Financial Report is available at: http://wellesleyma.gov/Pages/WellesleyMA_Finance/fin_statements/fy2015cafr.pdf

The most recent Moody's Credit Analysis is available online at: http://wellesleyma.gov/Pages/WellesleyMA_Finance/ratings/moodys_2016.pdf

Current Priorities

Unified Plan. The Town is in the initial stages of the development of a Unified Plan that will meld the concept of a Town-wide strategic plan with an update of the Planning Board's Comprehensive Plan. The Plan is "intended to articulate the core values of the community, establish a vision for the future and set Town-wide priorities and goals, and implementation strategies needed to advance them." The Unified Plan will establish a framework that will guide all of the Town's public bodies' work plans and budget priorities. The Executive Director is expected to take a lead role in the development of this plan and its subsequent implementation.

Capital Needs. For a number of years the Town has prioritized funding of its pension and OPEB liabilities, facilities maintenance, and control of health insurance costs, in order to insure long-term financial stability. The Town has also recently completed several major property acquisitions including 46 acres of land from Wellesley College, and 8 acres from the Catholic Archdiocese of Boston. Construction has begun on a new Senior Center. Further planning for the potential development of these properties and other capital initiatives, within the context of the Unified Plan, will be a key priority for the Executive Director.

Finances. Wellesley's finances are strong and stable, and are calibrated to address its long-term liabilities. Through its forecasting and financial planning the Town has identified approaching fiscal pressures that may, over the next few years, need to be addressed via a Proposition 2½ override vote in order to maintain quality services, capital investments and its scheduled pay down of liabilities. The Town anticipates the need for new revenues to maintain its currently strong and stable position. The Executive Director has primary

responsibility for financial management and will play a lead role on this issue.

Hardy Hunnewell Upham Facilities Project. One current, pressing capital project currently under review is the potential renovation and/or replacement of three elementary schools. Issues being studied as part of this project include physical conditions, programmatic needs, a philosophy of neighborhood schools, external impacts such as traffic, enrollment trends, and financial impact. A Master Planning Committee has been established to review and consider these issues and make a recommendation. The Executive Director is expected to assist with these analyses and planning.

Tolles Parsons Center. Since its formation in 1972 the Wellesley Council on Aging has operated within the privately held Wellesley Community Center. Over the past several years the Town has considered various options to expand the physical footprint of dedicated space for senior activities. The review of options culminated in the spring of 2016 with support for a newly constructed structure on Town-owned land. The Executive Director will be responsible for oversight of this major new facility.

900 Worcester Street. In 2012 the Town acquired an 8-acre parcel of land from the Archdiocese of Boston. The Town determined there was a community need for a multi-purpose recreational facility including an ice rink, a swimming pool and turf fields. The Town has sought private operators to build and manage the facilities with users from the Town, the higher education community, non-profits, and private parties. The Executive Director has played a lead role in bringing the project forward and will continue to do so in its implementation.

North 40. In 2014 the Town acquired a 46 acres of land from Wellesley College. The site has been a community resource of open space, trails and a community garden for a number of years. The Town acquired the land in order to control future use of the property in order to maintain community objectives for open space, public utilization and managed development in the interest of the Town. The Executive Director is expected to play a lead role in future planning for this property.

Development. The Town of Wellesley is largely built-out on that land which is not dedicated for open space. The Town's desirability has resulted in considerable new development over the past several years. These projects have been positive for the Town's revenues but have raised concern about the impact upon the Town's character, and ongoing financial health as developments slow. The Executive Director is expected to coordinate efforts related to these concerns.

The Ideal Candidate

The Board of Selectmen seeks to hire an Executive Director with significant managerial experience and preferably with demonstrated prior success within a complex municipal organization in a highly engaged community. The candidate should be competent in all areas of municipal management and operations, but especially the areas of municipal finance and financial planning, for which he/she has the greatest level of responsibility.

Because of the Town's decentralized structure of government and high level of citizen involvement, the Executive Director must be able to thoughtfully and intuitively lead through fostering collaboration and cooperation among various interests in the Town, including board and committee members, municipal and school department

heads, staff members, and especially residents. The Executive Director is expected to encourage and support continued positive school/town relationships, and to work and negotiate cooperatively with the business community and the Wellesley Chamber of Commerce, as well as the three institutions of higher education within the Town.

The Executive Director should be forward-thinking with the foresight to see issues that are on the horizon. The Executive Director should be intellectually curious, and open to technology, innovation and new practices in order to help develop and implement a vision and goals for moving the Town forward with creativity, unity, enthusiasm and optimism.

The Executive Director must be able to delegate effectively, mentor department heads and Selectmen's office staff, and provide support and motivation to ensure high performance and professional growth by all municipal employees with accountability to insure results for self and staff.

In many respects the Executive Director is a team-builder, coach, and conductor of the orchestra that is the larger municipal organization. The Executive Director must possess strong interpersonal skills and be able, in all forms, to communicate clearly and effectively with all constituencies, including presentations to Town Meeting.

Specific personal and professional qualities are priorities for the Board of Selectmen, municipal staff, and citizens. These qualities include: integrity, accessibility, patience, inclusiveness, transparency, and regular, clear communication in dealing with all constituencies (employees, boards, committees, citizenry, business owners); ability to actively listen and engage; ability to focus on problems and empower the Town's Boards and staff to solve problems; fairness

and kindness in dealing with employees and concern for employee welfare; fairness in dealings with citizens and concern for citizen welfare; and a willingness to recognize and compliment superior contributions from staff and volunteers.

The Executive Director must also possess and demonstrate successful experience in labor relations and personnel management. In particular the Executive Director must be able to help recruit highly talented staff, as the Town is generally recognized for the high quality of its employees. He or she must be able to develop and sustain credible relations with employees and multiple union representatives, being firm in negotiations but also recognized as a fair and honest broker with a reputation of being dependable and consistent.

The Town is seeking a professional with a passion for local government and in particular, the Town of Wellesley. The successful candidate must be collaborative and inclusive, able to respond to political and community pressure with positive and respectful, professional strategies and a ready and appropriate sense of humor.

The ideal candidate will have at least ten years of leadership or executive level experience, at increasing levels of responsibility. Experience in municipal government is preferred. The ideal candidate will possess demonstrated skills, abilities and knowledge in municipal finance, personnel administration, labor relations, municipal procurement, community planning and economic development, and intergovernmental relations.

An advanced degree in business, public administration or other appropriate field is preferred.

Compensation

The Town of Wellesley will offer an employment agreement and compensation package that is competitive with comparable Massachusetts communities. The current Executive Director's salary is \$190,000 with benefits. The new Executive Director's salary will be determined based on experience and qualifications. An attractive benefits package, including health and retirement plans, is included in the Executive Director's total compensation.

To Apply

Resumes, in confidence, by August 22, 2016 to:

Executive Director Search
Human Resources
525 Washington Street
Wellesley, MA

ELECTRONIC SUBMISSION PREFERRED:
EDSearch@wellesleyma.gov

Following the closing date, resumes will be reviewed according to the outlined qualifications. A Board of Selectmen appointed Town Manager Screening Committee will interview the most qualified candidates in confidence. Based upon these interviews a selection of finalists will be chosen for further evaluation and reference checks and then forwarded to the Selectmen for interviews and consideration before a final selection is made. Finalists will be contacted for references and approval of background reviews before their selection is publicly advanced to the Board of Selectmen

Wellesley is an EEO/AA employer

Questions regarding the position should be directed to Bernard Lynch, Principal, Community Paradigm Associates at blynch@communityparadigm.com, or 978-621-6733

